

BEST AVAILABLE COPY

PATENT

IN THE UNITED STATES

PATENT AND TRADEMARK OFFICE

APPLICANTS:

Garrett R. Goldfield, William K. Scarvie III, David Murray

and Todd Haseyama

APPLICATION NO.:

10/751,194

FILING DATE:

December 31, 2003

TITLE:

PROVIDING SOFTWARE APPLICATION HELP BASED ON HEURISTICS

EXAMINER:

Not yet known

GROUP ART UNIT:

2122

ATTY. DKT. NO.:

16319-08173

CERTIFICATE OF MAILING

I hereby certify that this correspondence is being deposited with the United States Postal Service as first class mail in an envelope addressed to: Mail Stop Missing Parts, Commissioner For Patents, P.O. Box 1450, Alexandria, VA 22313-1450, on the date shown below:

Dated: September 2, 2004

Amir H. Raubvogel, Reg. No.: 37,070

MAIL STOP MISSING PARTS **COMMISSIONER FOR PATENTS** P.O. BOX 1450 ALEXANDRIA, VA 22313-1450

PETITION FOR FILING ON BEHALF OF OMITTED INVENTORS UNDER 37 C.F.R. SECTION 1.47(a)

Dear Sir:

The named co-inventors, Garrett R. Goldfield and William K. Scarvie, hereby petition the Commissioner to accept the filing of the above-referenced U.S. patent application by them, as joint inventors of the invention disclosed and claimed in the above-referenced patent application, on behalf of the omitted inventors David Murray and Todd Haseyama.

09/08/2004 DEMMANU1 00000025 10751194

02 FC:1460

130.00 OP

The complete names last known addresses and citizenship of the omitted inventors who cannot be located are:

David Murray 7302 Spinnaker Street Carlsbad, CA 92009 Citizen of: USA

Todd Haseyama 415 Via Ultimo Encinitas, CA 92024 Citizen of: USA

A "DECLARATION OF FACTS BY PERSON HAVING FIRST HAND KNOWLEDGE IN SUPPORT OF FILING ON BEHALF OF AN OMITTED INVENTOR, DAVID MURRAY, UNDER 37 C.F.R. SECTION 1.47(a)" (hereinafter "DECLARATION OF FACTS") is enclosed to provide proof of the pertinent facts concerning the diligent effort to locate the omitted inventor to join in the above-referenced patent application.

A "DECLARATION OF FACTS BY PERSON HAVING FIRST HAND KNOWLEDGE IN SUPPORT OF FILING ON BEHALF OF AN OMITTED INVENTOR, TODD HASEYAMA, UNDER 37 C.F.R. SECTION 1.47(a)" (hereinafter "DECLARATION OF FACTS") is enclosed to provide proof of the pertinent facts concerning the diligent effort to locate the omitted inventor to join in the above-referenced patent application.

Therefore, the above-named co-inventors, Garrett R. Goldfield and William K. Scarvie, are entitled to file the above-referenced patent application on behalf of the omitted inventors, David Murray and Todd Haseyama. The enclosed EXHIBITS A-D are provided to support statements made in the enclosed DECLARATION OF FACTS.

As stated in each of the enclosed DECLARATION OF FACTS, David Murray and Todd

Haseyama are joint inventors of the subject matter of the above-referenced patent application

PATENT

along with Garrett R. Goldfield and William K. Scarvie. David Murray and Todd Haseyama

have not been located after a diligent search to sign a timely DECLARATION. Therefore,

Garrett R. Goldfield and William K. Scarvie, as joint inventors, make this application on behalf

of, and as agent for, the omitted inventors, David Murray and Todd Haseyama, pursuant to 37

C.F.R. section 1.47(a).

A DECLARATION signed by the joint inventors, Garrett R. Goldfield and William K.

Scarvie, on their own behalf and on behalf of the omitted inventors, David Murray and Todd

Haseyama, is also enclosed.

The required fee of \$130 pursuant to 37 C.F.R. section 1.17(i) is also enclosed.

This petition is being filed along with a RESPONSE TO NOTICE TO FILE MISSING

PARTS OF NONPROVISIONAL APPLICATION in response to a NOTICE TO FILE MISSING

PARTS OF NONPROVISIONAL APPLICATION, dated May 7, 2004, received from the

U.S.P.T.O.

Respectfully submitted,

Dated: September 2, 2004

Amir H. Raubvogel, Reg. No. 37,070

Fenwick & West LLP

801 California Street

Mountain View, CA 94041

Tel: (650) 335-7276

Fax: (650) 938-5200



IN THE UNITED STATES

PATENT AND TRADEMARK OFFICE

APPLICANTS:

Garrett R. Goldfield, William K. Scarvie III, David Murray

and Todd Haseyama

APPLICATION NO.:

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MAIL STOP MISSING PARTS COMMISSIONER FOR PATENTS P.O. BOX 1450 **ALEXANDRIA, VA 22313-1450**

DECLARATION OF FACTS BY PERSON HAVING FIRST HAND KNOWLEDGE IN SUPPORT OF FILING ON BEHALF OF OMITTED INVENTOR, DAVID MURRAY, UNDER 37 C.F.R. SECTION 1.47(a)

Dear Sir:

This Declaration of Facts is made as to the facts that are relied upon to establish diligent effort to secure the execution of the COMBINED DECLARATION AND POWER OF ATTORNEY by the omitted inventor, David Murray, for the above-referenced patent application after deposit in the U.S. Patent and Trademark Office.

This Declaration of Facts is being made by an available person having first-hand knowledge of the facts recited therein.

- I, Mike Graves, being employed by Intuit Inc. and having a business address at 2535 Garcia Avenue, Mountain View, CA 94043, hereby declare that:
 - 1. I am the Patent Program Manager at Intuit Inc.
- 2. It is my information and belief that David Murray is a co-inventor of the subject matter claimed in the above-referenced application.
- 3. It is my information and belief that David Murray's last known home address is 7302 Spinnaker St., Carlsbad, CA 92009.
- 4. On December 31, 2003, the above-referenced application, including a specification with drawings and claims and an abstract, was filed with the U.S. Patent and Trademark Office.
- 5. On May 7, 2004, we received a NOTICE TO FILE MISSING PARTS OF NONPROVISIONAL APPLICATION for the above-referenced application.
- 6. On June 18, 2004, I mailed via a UPS package (with Tracking No. 1Z3746W21350438929) to David Murray at 7302 Spinnaker St., Carlsbad, CA 92009, a Combined Declaration and Power of Attorney and a cover letter requesting David Murray to execute the Declaration. (Exhibit A)
- 7. The UPS online Shipment Details for the package sent to David Murray at 7302 Spinnaker St., Carlsbad, CA 92009 (with Tracking No. 1Z3746W21350438929) indicates that the package was delivered on June 21, 2004 and left at the front door. (Exhibit B)
- 8. On July 4, 2004, I mailed another package via UPS (with Tracking No. 123746w20253767834) to David Murray at 7302 Spinnaker St., Carlsbad, CA 92009 with a

PATENT

Combined Declaration and Power of Attorney and a cover letter requesting David Murray to

execute the Declaration. (Exhibit C)

12. The UPS online Shipment Details for the package sent to David Murray at 7302

Spinnaker St., Carlsbad, CA 92009 (with Tracking No. 123746w20253767837) indicates that the

package was delivered on _______ and left at the front door. (Exhibit D)

I hereby declare that all statements made herein to the best of my own knowledge are true

and that all statements made on information and belief are believed to be true; and further that

these statements were made with the knowledge that willful false statements and the like so made

are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United

States Code and that such willful statements may jeopardize the validity of the application or

any patent issued thereon.

Respectfully submitted,

Dated: 9/2/04

Mike Graves

Intuit Inc.

2535 Garcia Avenue

Mountain View, CA 94043



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Intuit Domestic Shipping Form

Contacting Xerox Shipping and Receiving 650-944-5323 or 650-944-3020

All fields of this form must be filled out completely to accurately process and track this shipment

Name	Lucy Letcher	Extension	45212
Department Number	677 -4722	Today's Date	6/18/04

Requested Service Priority Overnight Standard Overnight 2 Day Service Ground Signature required Special Delivery Pasidential Delivery	Delivery Commitment 10:30 AM Next Business Day 3:00 PM Next Business Day – 12% SAVINGS 2 Business Days – 80% SAVINGS 2-5 Business Days – 225% SAVINGS Courier to obtain signature from recipient Next day by 8:00AM – additional charges apply Please check for residential address/delivery
Residential Delivery	Please check for residential address/delivery

For more information on Mountain View Shipping Services, please check the Mail & Copy Services portion of the MV Corporate Services web site @ http://home.intuit.com/corporate_services/mt_view/mail_copy/shipping.html

Shipping Information (UPS and Fed Ex will not ship to PO Boxes)

Name	David Murray
Company	
Address	7302 Spinnaker St.
City	Carlsbad
State	CA
Zip	92009
Phone Number	

Xerox use only below this line					
Tracking Number					
Quality Control By					
Address Confirmation By					

446

Express	***************************************		
From Please print and press hard. Date	Sender's FedEx Account Number)
Sender's Name David	murray	Phone ()
Сотрапу			
Address			Dept/Floor/Suite/Room
City	s	tate ZIP	
Your Internal Billing Reference First 24 characters will appear on invoice.		OPTIONAL	
Recipient's Name Wike G	Graves #121		50) 944-3020
Address 2632 To "HOLD" at FedEx location, print FedEx address.	Marine	Way	We cannot deliver to P.O. boxes or P.O. ZIP codes.
City Mountain	View s	tate CAS ZIP	Dept/Roor/Suite/Room
By using the	online shipping	nditions on the back of this Ai	

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4a Express Package So	ervice	Packages up to 150 lbs.
FedEx Priority Overnight Next business morning	FedEx Standard Overni Next business afternoon	Delivery commitment may be later in some areas. ight FedEx First Overnight Earliest next business morning delivery to select locations
FedEx 2Day Second business day FedEx Envelope rate not availab	FedEx Express Saver Third business day le. Minimum charge: One-pound rate	I
4b Express Freight Ser		Packages over 150 lbs. Delivery commitment may be later in some areas.
FedEx 1Day Freight*	FedEx 2Day Freight Second business day	FedEx 3Day Freight Third business day
* Call for Confirmation:		
5 Packaging	· · · · · · · · · · · · · · · · · · ·	Declared value limit \$500
FedEx Envelope*	FedEx Pak* Includes FedEx Small Pak, FedEx Large Pak, and FedEx Sturdy Pak	
6 Special Handling	Institute FeelEv	address in Section 3.
SATURDAY Delivery Available ONLY for FedEx Priority Overnight and FedEx 2Day to select ZIP codes	HOLD Weekday at FedEx Location NOT Available for FedEx First Overnight	HOLD Saturday at FedEx Location Available ONLY for FedEx Priority Overnight and FedEx 2Day to select locations
Does this shipment contain One box must be	checked. —————	
No Yes As per attached Shipper's Declarat Dangerous Goods (including Dry Ice) cann		Dry Ice Dry Ice, 9, UN 1845 xkg
	or be arapped arredex packaging.	Cargo Aircraft Only
7 Payment Bill to:	- Enter FedEx Acct. No. or Credit Card No.	below.
Sender Acct. No. in Section 1 will be billed.	ipient Third Party	Credit Card Cash/Check
FedEx Acct. No. 1377 -	4363-9	Exp. Date
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Letcher, Lucy

From:

Kendall, Lee

Sent:

Monday, June 21, 2004 10:18 AM

To:

Letcher, Lucy

Subject:

UPS Tracking Numbers

Hi Lucy,

Here are your UPS tracking numbers for your shipments on 6/18/04.

- 1) David Murray 1z3746w21350438929
- 2) Paula Daniels @ Wintellect 1z3746w20151574712

Thank You,

Lee Kendall IKON Site Operations Manager Intuit -Mountain View

(650) 944-3054 Office (650) 944-6688 Fax lee_kendall@intuit.com





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Tracking

- → Track by Tracking Number.
- → Track by Reference Number
- → Import Tracking Numbers &
- → Track by E-mail
- → Get Quantum View Files ≜
- → Request Quantum View Notify à
- → Void a Shipment #



Find Answers to Your Tracking Questions

→ Go to Tracking Number FAQ or the term of the communication

IIIIII Track by Tracking Number

View Details

Status:

Delivered

Delivered on:

Jun 21, 2004 12:03 P.M.

Location:

FRONT DOOR

Delivered to: Shipped or Billed on: Jun 18, 2004

CARLSBAD, CA, US

Tracking Number: Service Type:

1Z 374 6W2 13 5043 892 9 **NEXT DAY AIR SAVER**

Package Progress:

Date/ Time	Location	Activity
Jun 21, 2004		

12:03 P.M. SAN MARCOS, CA, US **DELIVERY** 5:40 A.M. SAN MARCOS, CA, US **OUT FOR DELIVERY ARRIVAL SCAN** SAN MARCOS, CA, US 4:40 A.M. Jun 19, 2004 **DEPARTURE SCAN** ONTARIO, CA, US 6:39 A.M.

Jun 18, 2004 ONTARIO, CA, US **ARRIVAL SCAN** 10:55 P.M. 9:48 P.M. OAKLAND, CA, US **DEPARTURE SCAN** 8:53 P.M. OAKLAND, CA, US ARRIVAL SCAN SUNNYVALE, CA, US **DEPARTURE SCAN** 7:30 P.M.

BILLING INFORMATION 7:04 P.M. RECEIVED SUNNYVALE, CA, US ORIGIN SCAN 6:05 P.M.

5:57 P.M. SUNNYVALE, CA, US FORWARDED TO THE FACI IN THE DESTINATION CITY

SUNNYVALE, CA, US PICKUP SCAN . 5:21 P.M.

Tracking results provided by UPS: Sep 1, 2004 2:14 P.M. Eastern Time (USA)

NOTICE: UPS authorizes you to use UPS tracking systems solely to track shipments tendered by you to UPS for delivery and for no other purpose. Any other use of UPS tracking systems and information is strictly prohibited.

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Intuit Domestic Shipping Form

Contacting Xerox Shipping and Receiving 650-944-5323 or 650-944-3020

All fields of this form must be filled out completely to accurately process and track this shipment

Name	Lucy Letcher	Extension	45212
Department Number	677 -4722	Today's Date	7/14/04

	Requested Service	Delivery Commitment
	Priority Overnight	10:30 AM Next Business Day
	Standard Overnight	3:00 PM Next Business Day – 12% SAVINGS
A	2 Day Service	2 Business Days – 80% SAVINGS
	Ground	2-5 Business Days – 225% SAVINGS
	Signature required	Courier to obtain signature from recipient
	Special Delivery	Next day by 8:00AM – additional charges apply
	Residential Delivery	Please check for residential address/delivery
Eas	r mara information on I	Mountain View Chinning Comings, places shook

For more information on Mountain View Shipping Services, please check the Mail & Copy Services portion of the MV Corporate Services web site @ http://home.intuit.com/corporate_services/mt_view/mail_copy/shipping.html

Shipping Information (UPS and Fed Ex will not ship to PO Boxes)

Name	David Murray	
Company		
Address	7302 Spinnaker St.	
City	Carlsbad	
State	CA	
Zip	92009	
Phone Number		

Phone Number	
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Tracking Number	
Quality Control By	
Address Confirmation By	

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FedEx. USA Airbill reference Express	Sender's FedEx Account Number	- Kerrina	Spinnaker !		mike Graves	2632 Marine W	V. C. State	Try online shipping at fedex.com, by using this Arbill you give to the service conditions on the back of this Arbill and in our current Service Guide, including terms that limit on the beside.	Questions? Visit our Web site at fed or call 1,800.Go.FedEx® 800.463,3339.
FedEx. Express	From Pease print and press hard. Date	Sender's Name De C. A.	Address 730'2	City CowlSbcd. 2 Your Internal Billing Reference	Recipient's Name Name Commany	FedEx toca	مانحا مان ما المان ا		



P.O. Box 7850 Mountain View, CA 94039-7850 http://www.quicken.com July 12, 2004

Mike Graves Intuit 2535 Garcia Avenue, Mountain View, CA 94043

David Murray 7302 Spinnaker Street Carlsbad, CA 92009

Dear David:

I hadn't heard back from you, so I thought I'd follow up.

Enclosed are two forms for your signature, following up on the voice mail message I recently left. These are required to finalize filing the patent application on which you are named as an inventor, Providing Software Application Help Based on Heuristics.

Please sign the Combined Declaration and Power of Attorney form first, under your name on page 3. I am collecting the signatures of the other inventors separately.

Only after signing the Combined Declaration, please also sign the Assignment form. Please sign this form in the presence of a Notary Public and have the Notary sign and apply his/her seal. Let me know if you incur any expenses for notarization, obtain a receipt, and I will reimburse you. Your bank should be able to provide notary service.

After you have signed the documents, please return them to me in the enclosed envelope. If you have any questions, please don't hesitate to give me a call (650-944-5492) or contact me via email (<u>mike_graves@intuit.com</u>).

Thanks very much,

Mike Graves∖

Patent Program Manager





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Tracking

→ <u>Track by Tracking</u> <u>Number</u>

- → <u>Track by Reference</u> <u>Number</u>
- → Import Tracking Numbers ≜
- → Track by E-mail
- → Get Quantum View Files ≜
- → Request Quantum View Notify •
- → Void a Shipment A
- → Help



Find Answers to Your Tracking Questions

→ Go to Tracking Number FAQ

Track by Tracking Number

View Details

Status: Delivered

Delivered on: Jul 14, 2004 1:09 P.M.

Location: MAT/FRONT

Delivered to: CARLSBAD, CA, US Shipped or Billed on: Jul 12, 2004

implea of binea on: 30/12, 20

Tracking Number: 1Z 374 6W2 02 5376 783 9

Service Type: 2ND DAY AIR **Weight:** .30 Lb

Package Progress:

Date/ Time	Location	Activity
Jul 14, 2004 1:09 P.M. 6:00 A.M. 3:45 A.M. Jul 13, 2004 11:40 P.M. 2:20 P.M. 3:33 A.M. Jul 12, 2004 9:05 P.M. 7:23 P.M.	SAN MARCOS, CA, US SAN MARCOS, CA, US SAN MARCOS, CA, US VERNON, CA, US VERNON, CA, US SUNNYVALE, CA, US SUNNYVALE, CA, US US	DELIVERY OUT FOR DELIVERY ARRIVAL SCAN DEPARTURE SCAN ARRIVAL SCAN DEPARTURE SCAN ORIGIN SCAN BILLING INFORMATION RECEIVED

Tracking results provided by UPS: Sep 2, 2004 5:04 P.M. Eastern Time (USA)

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Dated: September 2, 2004

Raubvogel, Reg. No.: 37,070

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Dear Sir:

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This Declaration of Facts is being made by an available person having first-hand knowledge of the facts recited therein.

- I, Mike Graves, being employed by Intuit Inc. and having a business address at 2535 Garcia Avenue, Mountain View, CA 94043, hereby declare that:
 - 1. I am the Patent Program Manager at Intuit Inc.
- 2. It is my information and belief that Todd Haseyama is a co-inventor of the subject matter claimed in the above-referenced application.
- 3. It is my information and belief that Todd Haseyama's last known home address is 415 Via Ultimo, Encinitas, CA 92024.
- 4. On December 31, 2003, the above-referenced application, including a specification with drawings and claims and an abstract, was filed with the U.S. Patent and Trademark Office.
- 5. On May 7, 2004, we received a NOTICE TO FILE MISSING PARTS OF NONPROVISIONAL APPLICATION for the above-referenced application.
- 6. On August 6, 2004, I mailed via a UPS package (with Tracking No. 1Z3746W20253039572) to Todd Haseyama at 415 Via Ultimo, Encinitas, CA 92024, a Combined Declaration and Power of Attorney and a cover letter requesting Todd Haseyama to execute the Declaration. (Exhibit A)
- 7. The UPS online Shipment Details for the package sent to Todd Haseyama at 415 Via Ultimo, Encinitas, CA 92024 (with Tracking No. 1Z3746W20253039572) indicates that the package was delivered on August 10, 2004 and left at the front door. (Exhibit B)
- 8. On August 17, 2004, I mailed another package via UPS (with Tracking No. 1Z3746W20253602677) to Todd Haseyama at 415 Via Ultimo, Encinitas, CA 92024 with a

PATENT

Combined Declaration and Power of Attorney and a cover letter requesting David Murray to

execute the Declaration. (Exhibit C)

12. The UPS online Shipment Details for the package sent to Todd Haseyama at 415

Via Ultimo, Encinitas, CA 92024 (with Tracking No. 1Z3746W20253602677) indicates that the

package was delivered on August 19, 2004 and left at the front door. (Exhibit D)

I hereby declare that all statements made herein to the best of my own knowledge are true

and that all statements made on information and belief are believed to be true; and further that

these statements were made with the knowledge that willful false statements and the like so made

are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United

States Code and that such willful statements may jeopardize the validity of the application or

any patent issued thereon.

Respectfully submitted,

Dated: 7/2/04

Mike Graves

Intuit Inc.

2535 Garcia Avenue

Mountain View, CA 94043



Name



Intuit Domestic Shipping Form

Contacting Xerox Shipping and Receiving 650-944-5323 or 650-944-3020

All fields of this form must be filled out completely to accurately process and track this shipment

Extension

45212

Lucy Letcher

Department Number	677 -4722		Today's Date	8/6/04
For more inforthe Mail & Co	vernight Overnight vice required elivery al Delivery rmation on N py Services uit.com/corpo	10:30 AM 3:00 PM N 2 Business 2-5 Busine Courier to Next day b Please chee Mountain Vi portion of the rate_services Shipping I	Days – 80% ess Days – 22 obtain signatery 8:00AM – sek for residentew Shipping the MV Corpo	s Day S Day – 12% SAVINGS SAVINGS SAVINGS Ure from recipient additional charges apply stial address/delivery Services, please check orate Services web site @ _copy/shipping.html
Name	Todd Ha	seyama		
Company				
Address	415 Via			
City	Encinita	<u> </u>		
State	CA			
Zip	92024			
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Tracking Num	ıber			
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lecipient's lame	ke Graves	Phone (650) 945	1-5492
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nddress 26 "HOLD" at FedEx location, print i	32 Marine	Way #MIVO,	/- Z_ baxes or P.O. ZIP codes.
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Try online shipping	at redex.com

By using this Airbill you agree to the service conditions on the back of this Airbill and in our current Service Guida, including terms that limit our liability.

Questions? Visit our Web site at fedex.com or call 1.800.Go.FedEx® 800.463.3339.

:a. 020		Sender's Copy
4a Express Package Sen	rice	Packages up to 150 lbs.
FedEx Priority Overnight Next business morning	FedEx Standard Overnight Next business afternoon	Delivery commitment may be later in some areas. FedEx First Overnight Earliest next business morning delivery to select locations
FedEx 2Day Second business day FedEx Envelope rate not available. N	FedEx Express Saver Third business day linimum charge: One-pound rate	
4b Express Freight Service		Packages over 150 lbs. elivery commitment may be later in some areas.
FedEx 1Day Freight* Next business day Call for Confirmation:	FedEx 2Day Freight Second business day	FedEx 3Day Freight Third business day
5 Packaging FedEx Envelope*	FedEx Pak* Includes FedEx Small Pak, FedEx Large Pak, and FedEx Sturdy Pak	* Declared value limit \$500
6 Special Handling SATIRDAY Delivery Available ONLY for Feder Promy Overnight and Feder 2Day to select ZIP codes Does this shipment contain day One box must be che	hoLD Weekday at FedEx Location NOT Available for FedEx First Overnight ngcrous goods?	ss in Section 3. HOLD Saturday at FedEx Location Available ONLY for FedEx Priority Overnight and FedEx 20 by to select locations
. No Yes As per attached Shipper's Declaration langerous Goods (including Dry Ice) cannot be	not required L Dry l	y Ice Ice, 9, UN 1845 xkg Cargo Aircraft Only
Payment Bill to: Sender Acct No. in Section MRecipies	2	Credit Card Cash/Check
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Release Signature Sign	to authorize delivery without obtaining signature.	
By signing you authorize us to and agge to indemnify and be	deliver this shipment without obtaining a sign lid us harmless from any resulting claims.	nature 446

Rev. Date 10/01+Part #157612+©1994-2001 FedEx+PRINTED IN U.S.A. WCSL 02



P.O. Box 7850 Mountain View, CA 94039-7850 http://www.quicken.com August 6, 2004

Mike Graves
Intuit
2535 Garcia Avenue,
Mountain View, CA 94043

Todd Haseyama 415 Via Ultimo Encinitas, CA 92024

Dear Todd:

Enclosed are two forms for your signature, following up on the e mail message I recently sent. These are required to finalize filing the patent application on which you are named as an inventor, Providing Software Application Help Based on Heuristics.

Please sign the Combined Declaration and Power of Attorney form first, under your name on page 3. I am collecting the signatures of the other inventors separately.

Only after signing the Combined Declaration, please also sign the Assignment form. Please sign this form in the presence of a Notary Public and have the Notary sign and apply his/her seal. Let me know if you incur any expenses for notarization, obtain a receipt, and I will reimburse you. Your bank should be able to provide notary service.

After you have signed the documents, please return them to me in the enclosed envelope. If you have any questions, please don't hesitate to give me a call (650-944-5492) or contact me via email (<u>mike_graves@intuit.com</u>).

Thanks very much,

Mike Graves

Patent Program Manager

0010,000					 		
0010/PTO Rev. 6/95	U.S. Department Patent and Trad		Attorney Docket	Number	16319-0817	73	
•			First Named Inve	ntor	Garrett R.	Goldfield	
COMBINED DECI 1.63) AND POWE		•	·	C	OMPLETE IF KN	OWN	
FOR UTILIT PATENT AI			Application Num	ber	10/751,194		
			Filing Date		December 3	31, 2003	, -
			Group Art Unit		2122		
[] Declaration OR Submitted with Initial Filing	S	eclaration ubmitted after nitial Filing	Examiner Name		not yet kno	wn	
the specification of which [] is attached hereto OR [X] was filed on 12/31/2003 I hereby state that I have reviewe amended by any amendment spe I acknowledge the duty to disclo Regulations. § 1.56. I hereby claim foreign priority b for patent or inventor's certifical	as United State and understate information tenefits under 7 te, or § 365 (a)	ARE APPLI (Title of Apples Application Number of the contents of the dot of	ed and for which a p ICATION HE Dication) The 10/751,194 The above identified The above identified The patentability as defended by the code § 119 (a)-(attional application were seen as a seen as	specification in Tit	on, including the case of the 37 Code of Federal (b) of any foreign nated at least one of	claims, as eral application(s) country other than	n the United
States of America, listed below of any PCT international applications	ation having a	filing date before the	nat of the application	on which	priority is claimed	l	
Prior Foreign Application	Coun	•	eign Filing Date		Priority	Certified Cop	, ,
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Given Name Garrett	i riist ii	iventor.	Midd Initia	le p		Family Name		oldfield	unsigne	- IIIVC		Suffix		
Inventor's Signature			mua		1	1 Taille	I		Date				<u>.</u>	
Residence: City	Encinitas			State	CA	Coun	ry	USA	1		Citizenship	us		
Mailing Address	236 Cal	le De Madera								•				
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[x] Additional in	entors are	being named or	n supp	lementa	sheet	(s) attach	ed he	ereto		_				

]]	DECLARATION							ADI	OITION Suppl			TOR(S))		
Name of Additi	onal Joint Inventor	; if a	nv:		[]/	A petitio	n ha	s been i				ned inv	entor		
Given Name William		Midd Initia	ile	K.		amily lame	Sca	rvie	· .				Suff	īx	Ш
Inventor's Signature									Date						
Residence: City	San Diego		State	e C	A	Count	гу	USA			Citi	zenship	τ	US	
Mailing Address	4265 Mt. Voss Dr.														
Mailing Address															
City San Diego			Sta	te (CA	Zip	92	117	,	Coun	try	USA			
Name of Additi	onal Joint Inventor	r, if a	ny:		[] 4	A petitio	n ha	s been	filed fo	r this	unsig	ned inv	entor		
Given Name David		Midd Initia				amily Vame	Μι	ırray					Suf	fix	
Inventor's Signature									Date						
Residence: City	Carlsbad		State	e C	A	Count	гу	USA			Citi	zenship	· l	US	
Mailing Address	7302 Spinnaker Stree	et													
Mailing Address															
City Carlsbad			Sta	te (CA	Zip	92	009	l	Coun	trv	USA			
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	onal Joint Inventor				[]	A petition				_		ned inv			
Given Name Todd	onal Joint Inventor	r , if a Mide Initia	ile		[] A		on ha		filed fo	_		· · · · · · · · · · · · · · · · · · ·	ento		
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ASSIGNMENT

For good and valuable consideration, the receipt of which is hereby acknowledged, the person(s) named below (referred to as "INVENTOR" whether singular or plural) has sold, assigned, and transferred and does hereby sell, assign, and transfer to Intuit Inc., a Delaware corporation, having a place of business at 2535 Garcia Avenue, Mountain View, California 94043, ("ASSIGNEE"), for itself and its successors, transferees, and assignees, the following:

1.	The	entire	worldwide	right,	title,	and	interest	in	all	inventions	and
improvements	("SU	BJECT	MATTER")	that ar	e discl	osed	in the pro	visi	onal	application	filed
under 35 U.S	.C. §1	11(b) c	or non-provis	sional a	pplica	tion f	iled unde	r 35	5 U.S	S.C. §111(a)	and
entitled PRO	VIDI	NG SO	FTWARE A	PPLIC	CATIC)N H	ELP BAS	SEL	ON	HEURIST	TICS
("APPLICAT	("NOI	, which	•								

is to be filed herewith

was filed on <u>12/31/2003</u>, now bearing U.S. serial number <u>10/751,194</u> and for which a Declaration was executed by INVENTOR on the date(s) below; and

2. The entire worldwide right, title, and interest in and to:
(a) the APPLICATION; (b) all applications claiming priority from the APPLICATION; (c) all divisional, continuation, substitute, renewal, reissue, and other related applications thereto which have been or may be filed in the United States or elsewhere in the world; (d) all patents (including reissues and re-examinations) which may be granted on the applications set forth in (a), (b), (c) and (d) above; and (e) all right of priority in the APPLICATION, together with all rights to recover damages for infringement of provisional rights.

INVENTOR agrees that ASSIGNEE may apply for and receive patents for SUBJECT MATTER in ASSIGNEE's own name.

INVENTOR agrees to do the following, when requested, and without further consideration while INVENTOR is under contract or employment with ASSIGNEE, in order to carry out the intent of this Assignment: (1) execute all oaths, assignments, powers of attorney, applications, and other papers necessary or desirable to fully secure to ASSIGNEE the rights, titles and interests herein conveyed; (2) communicate to ASSIGNEE all known facts relating to the SUBJECT MATTER; and (3) generally do all lawful acts that ASSIGNEE shall consider desirable for securing, maintaining, and enforcing worldwide patent protection relating to the SUBJECT MATTER and for vesting in ASSIGNEE the rights, titles, and interests herein conveyed. INVENTOR further agrees to provide any successor, assign, or legal representative of ASSIGNEE with the benefits and assistance provided to ASSIGNEE hereunder. INVENTOR further agrees that the obligations under this paragraph will apply even after INVENTOR has ceased to be under contract or employment with ASSIGNEE, provided ASSIGNEE will reimburse INVENTOR at a reasonable rate for time or expenses actually spent by INVENTOR on ASSIGNEE's behalf.

INVENTOR represents that INVENTOR has the rights, titles, and interests to convey as set forth herein, and covenants with ASSIGNEE that the INVENTOR has not made and will not hereafter make any assignment, grant, mortgage, license, or other agreement affecting the rights, titles, and interests herein conveyed.

INVENTOR grants the attorney of record the power to insert on this Assignment any further identification that may be necessary or desirable in order to comply with the rules of the United States Patent and Trademark Office for recordation of this document.

HEURISTI Tiled: December 31, 10/751,194		
This Assignment m		ore counterparts, each of which shal as one and the same Assignment.
Name and Signature	Date of Signature	Date Declaration Executed By This Person
GARRETT GOLDFIELD		
State of California County of San Diego		
	e to be the person whose name	ne is subscribed to the within instrumer
pasis of satisfactory evidence and acknowledged to me the signature on the instrumen	nat he executed the same in I	nis authorized capacity, and that by hi
and acknowledged to me the signature on the instrument executed the instrument.	nat he executed the same in I	ne is subscribed to the within instrumer his authorized capacity, and that by his pon behalf of which the person acted Notary Date Declaration Executed By This Person
pasis of satisfactory evidence and acknowledged to me the signature on the instrument executed the instrument. Notary Seal	nat he executed the same in he take the person, or the entity up	nis authorized capacity, and that by his pon behalf of which the person acted Notary Date Declaration
Name and Signature WILLIAM K. SCARVIE State of California County of San Diego	Date of Signature	nis authorized capacity, and that by his pon behalf of which the person acted Notary Date Declaration

2 of 3

Notary

Notary Seal

Title of Document: ASSIGNMENT	·		PATEN
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Re:			
Title: PROVIDING	SOFTWARE APPLIC	CATION H	IELP BASED ON
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Filed: December 31, 200	3	. *	
Serial No.: 10/751,194	· · · · · · · · · · · · · · · · · · ·		
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			Date Declaration
Name and Signature	Date of Signature		Executed By This Person
·			
DAVID MURRAY			
	•		
State of California			
County of San Diego			•
<u>-</u>			
On	before me,		personally
appeared DAVID MURRAY, p	ersonally known to me	or proved	to me on the basis of satisfactory
			instrument and acknowledged to
me that he executed the sam			
instrument the person, or the			the person acted, executed the
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Notary Seal Name and Signature TODD HASEYAMA	e entity upon behalf —		Notary Date Declaration
Notary Seal Name and Signature TODD HASEYAMA State of California	e entity upon behalf —		Notary Date Declaration
Notary Seal Name and Signature TODD HASEYAMA	e entity upon behalf —		Notary Date Declaration
Notary Seal Name and Signature TODD HASEYAMA State of California County of San Diego	Date of Signature	of which	Notary Date Declaration Executed By This Person
Notary Seal Name and Signature TODD HASEYAMA State of California County of San Diego On	Date of Signature before me,	of which	Notary Date Declaration Executed By This Person personally
Notary Seal Name and Signature TODD HASEYAMA State of California County of San Diego On appeared TODD HASEYAMA	Date of Signature	to me or	Notary Date Declaration Executed By This Person personally proved to me on the basis of
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Notary

Notary Seal



PLEASE SEND ME TRACKING #

Intuit Domestic Shipping Form

Contacting Xerox Shipping and Receiving 650-944-5323 or 650-944-3020

All fields of this form must be filled out completely to accurately process and track this shipment

Name	Lucy Letcher	Extension	45212
Department Number	677 -4722	Today's Date	8/17/04

	Requested Service	Delivery Commitment		
	Priority Overnight	10:30 AM Next Business Day		
	Standard Overnight	3:00 PM Next Business Day – 12% SAVINGS		
K	2 Day Service	2 Business Days – 80% SAVINGS		
	Ground	2-5 Business Days – 225% SAVINGS		
	Signature required	Courier to obtain signature from recipient		
	Special Delivery	Next day by 8:00AM – additional charges apply		
	Residential Delivery	Please check for residential address/delivery		
For more information on Mountain View Shipping Services, please check				
the Mail & Copy Services portion of the MV Corporate Services web site @				
http://home.intuit.com/corporate_services/mt_view/mail_copy/shipping.html				
		•		

Shipping Information (UPS and Fed Ex will not ship to PO Boxes)

Name	Todd Haseyama
Company	
Address	415 Via Ultimo
City	Encinitas
State	CA
Zip	92024
Phone Number	

Xerox use only below this line

Tracking Number	123746 w 20253602677
Quality Control By	
Address Confirmation By	

Sender's Copy Packages up to 150 lbs.

Delivery committee for by but in towns event.

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FedEx Priority Overnight For FedEx 3Day Freight
Third business day Cargo Aircraft Only ğ 7 Payment Bill to: Ener Fedes Acet No. or Credit Card No. bolow.

Sender Third Party Credit Card Dry Ice Dry Ice, 9, UN 1845 __ Include FedEx address in Section 3. †Our liability is limited to \$100 unless you declare a higher value. See back for details Total Declared Value By signing you authorize us to deliver this shipment without obtaining a signature and agree to indemnify and hold us harmless from any resulting claims. 8 Release Signature Sign to authorite delivery without obtaining signature. FedEx Pak* Includes FedEx Small Pak, FedEx Large Pak, and FedEx Sturdy Pak FedEx 20ay
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Inclusioness day
FedEx Environe rate not evalable. Minimum charge. One-pound rate FedEx 2Day Freight Second business day HOLD Weekday
at FedEx Location
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Fedex 20ay to select ZIP codes Special Handling FedEx 1Day Freight*
Next business day FedEx Envelope* Total Packages 5 Packaging Call for Confirmation: FedEx Acct. No. Credit Card No. 9 Dept/Roor/Suits/Room cannot deliver to P.O. boxes or P.O. ZIP codes. Dept/Roor/Suite/Room Freein B 37531953765 Stote as オMCVOLと By using this Airbill you agree to the service conditions on the back of this Airbill and in our current Service Guide, including terms that limit our liability. Try online shipping at fedex.com Questions? Visit our Web site at fedex.com or call 1.800.Go.FedEx® 800.463.3339. ZIP OPTIONAL Haseyamane State CA <u>کہ</u> 3 FedEx . USA Airbill Sender's FedEx Account Number 2632 manine M. Ke Graves とるい 2 Your Internal Billing Reference Fixt 24 characters will appear on invoice. ノスセンナ Address 76 57
To 'HOLD' at FedEx location, print FedEx address. 1 From Please print and press hard. MARK Recipient's Name Sender's Name Company Сопрапу Address Address

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P.O. Box 7850 Mountain View, CA 94039-7850 http://www.quicken.com August 17, 2004

Mike Graves Intuit 2535 Garcia Avenue, Mountain View, CA 94043

Todd Haseyama 415 Via Ultimo Encinitas, CA 92024

Dear Todd:

Enclosed are two forms for your signature, following up on the e mail message and letter I recently sent. These are required to finalize filing the patent application on which you are named as an inventor, Providing Software Application Help Based on Heuristics.

Please sign the Combined Declaration and Power of Attorney form first, under your name on page 3. I am collecting the signatures of the other inventors separately.

Only after signing the Combined Declaration, please also sign the Assignment form. Please sign this form in the presence of a Notary Public and have the Notary sign and apply his/her seal. Let me know if you incur any expenses for notarization, obtain a receipt, and I will reimburse you. Your bank should be able to provide notary service.

After you have signed the documents, please return them to me in the enclosed envelope. If you have any questions, please don't hesitate to give me a call (650-944-5492) or contact me via email (<u>mike_graves@intuit.com</u>).

Thanks very much,

Mike Graves

Patent Program Manager

Graves, Mike

From:

Letcher, Lucy

Sent:

Wednesday, August 18, 2004 9:46 AM

To:

Graves, Mike

Subject:

FW: UPS Ship Notification, Tracking Number 1Z3746W20253602677

Follow Up Flag: Follow up Flag Status: Flagged

----Original Message-----

From: QuantumViewNotify@ups.com [mailto:QuantumViewNotify@ups.com]

Sent: Tuesday, August 17, 2004 6:04 PM

To: Lucy_Letcher@intuit.com

Subject: UPS Ship Notification, Tracking Number 1Z3746W20253602677

***Do not reply to this e-mail. UPS and INTUIT will not receive your reply.

This message was sent to you at the request of INTUIT to notify you that the package information below has been transmitted to UPS. The package(s) may not have actually been placed with UPS for shipment. To verify when and if the shipment is tendered to UPS and its actual transit status, click on the tracking link below or contact INTUIT directly.

Important Delivery Information

Scheduled Delivery: 19-August-2004

Shipment Detail

Ship To:

T. HASEYAMA TODD HASEYAMA 415 VIA ULTIMO **ENCINITAS** CA 92024

US

Number of Packages: 1

UPS Service:

2ND DAY AIR

Weight:

0.3 LBS

Tracking Number:

1Z3746W20253602677

Department Number: 677-4722

Reference Number 2: 677-4722 L. LETCHER

<u>Click here</u> to track if UPS has received your shipment or visit http://www.ups.com/WebTracking/track?loc=en_US on the Internet.

This e-mail contains proprietary information and may be confidential. If you are not the intended recipient of this e-mail, you are hereby notified that any dissemination, distribution or copying of this message is strictly prohibited. If you received this message in error, please delete it immediately.

This e-mail was automatically generated by UPS e-mail services at the shipper's request. Any reply to this e-mail will not be received by UPS or the shipper. Please contact the shipper directly if you have questions regarding the referenced shipment or you wish to discontinue this notification service.

____2@@2@@2z81@eX6___

Subject: FW: UPS Tracking Number Date: Monday, August 9, 2004 8:36 AM

From: Letcher, Lucy <Lucy_Letcher@intuit.com> **To:** "Graves, Mike" <Mike_Graves@intuit.com>

```
> ----Original Message----
> From: Kendall, Lee
> Sent: Monday, August 09, 2004 7:15 AM
> To: Letcher, Lucy
> Subject: UPS Tracking Number
>
> Hi Lucy,
>
> Here' your UPS tracking number for your shipment on 8/6/04 to Todd
> Haseyama. 1z3746w20253039572
>
> Thank You,
>
> Lee Kendall
> IKON Site Operations Manager
> Intuit -Mountain View
>
> (650) 944-3054 Office
> (650) 944-6688 Fax
> lee_kendall@intuit.com
```





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Tracking

- → Track by Tracking Number
- → Track by Reference Number
- → Import Tracking Numbers &
- → Track by E-mail
- → Get Quantum View <u>Files</u> **≜**
- → Request Quantum View Notify
- → Void a Shipment a
- → <u>Help</u>



Find Answers to Your Tracking Questions

→ Go to Tracking Number FAQ

Log-In User ID:

Password:



| Forgot Password



Track by Tracking Number

View Details

Status:

Delivered

Delivered on:

Aug 10, 2004 3:17 P.M.

Location:

MAT/FRONT

Delivered to:

ENCINITAS, CA, US

Shipped or Billed on: Aug 6, 2004

Tracking Number:

1Z 374 6W2 02 5303 957 2

Service Type: Weight:

2ND DAY AIR

.30 Lb

Package Progress:

Date/ Time	Location	Activity
Aug 10, 2004		
3:17 P.M.	SAN DIEGO, CA, US	DELIVERY
7:36 A.M.	SAN DIEGO, CA, US	OUT FOR DELIVERY
2:00 A.M.	SAN DIEGO, CA, US	ARRIVAL SCAN
Aug 9, 2004		
11:01 P.M.	VERNON, CA, US	DEPARTURE SCAN
2:18 P.M.	VERNON, CA, US	ARRIVAL SCAN
4:14 A.M.	SUNNYVALE, CA, US	DEPARTURE SCAN
Aug 6, 2004		
7:32 P.M.	SUNNYVALE, CA, US	ORIGIN SCAN
7:17 P.M.	US	BILLING INFORMATION RECEIVED

Tracking results provided by UPS: Sep 1, 2004 2:05 P.M. Eastern Time (USA)

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Tracking

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Password:

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IIIIII Track by Tracking Number

View Details

Log-In User ID:

Status:

Delivered

Delivered on:

Aug 19, 2004 2:24 P.M.

Location: Delivered to: FRONT DOOR **ENCINITAS, CA, US**

Shipped or Billed on: Aug 17, 2004

Tracking Number: Service Type:

1Z 374 6W2 02 5360 267 7

Weight:

2ND DAY AIR

.30 Lb

Package Progress:

Date/ Time	Location	Activity	
Aug 19, 2004			
2:24 P.M.	SAN DIEGO, CA, ÚS	DELIVERY	
6:00 A.M.	SAN DIEGO, CA, US	OUT FOR DELIVERY	
5:55 A.M.	SAN DIEGO, CA, US	ARRIVAL SCAN	
5:29 A.M.	VERNON, CA, US	DEPARTURE SCAN	
Aug 18, 2004			
1:42 P.M.	VERNON, CA, US	ARRIVAL SCAN	
3:39 A.M.	SUNNYVALE, CA, US	DEPARTURE SCAN	
Aug 17, 2004			
7:21 P.M.	US	BILLING INFORMATION	
•		RECEIVED	
6:31 P.M.	SUNNYVALE, CA, US	ORIGIN SCAN	
Tracking results provided by IIPS: Sep 1, 2004, 2:03 P.M. Eastern Time (IISA)			

Tracking results provided by UPS: Sep 1, 2004 2:03 P.M. Eastern Time (USA)

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